

# **Automated User Account Setup**

## **Electronic Records Express**

### **Sponsor Instruction Guide**



**Office of Disability Programs**  
**Office of Process Policy**

May 2006

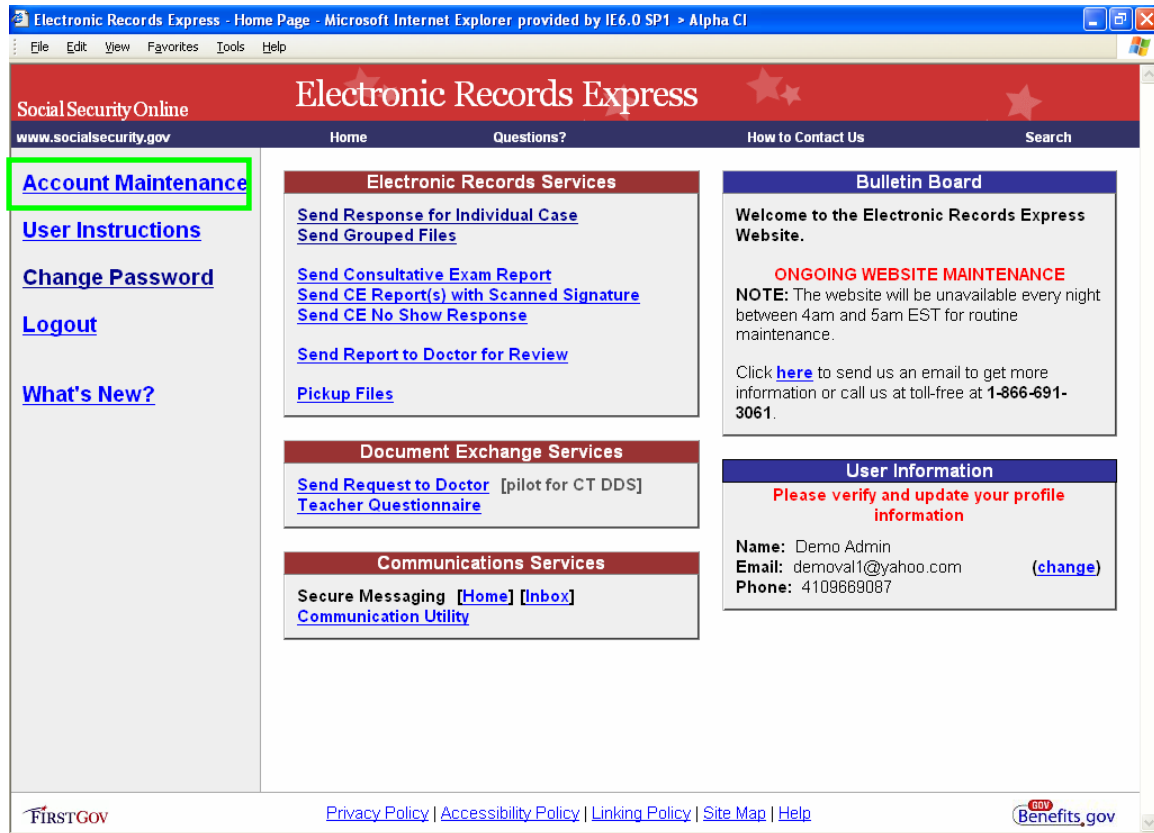
## **Automated User Account Setup – Sponsor Instruction Guide**

### **Table of Contents**

<b>Access the Account Maintenance Menu .....</b>	<b>3</b>
<b>Create an Individual End-User Account .....</b>	<b>5</b>
<b>Create an Organizational Shared End-User Account .....</b>	<b>15</b>
<b>Search Accounts on Specified Criteria .....</b>	<b>25</b>
<b>List All Accounts Alphabetically by User ID .....</b>	<b>28</b>
<b>Modify an Account.....</b>	<b>30</b>
<b>Suspend an Account.....</b>	<b>32</b>
<b>Reactivating a Suspended Account .....</b>	<b>35</b>
<b>Resetting a Password .....</b>	<b>37</b>
<b>Deleting an Account.....</b>	<b>40</b>
<b>Modifying Your Account.....</b>	<b>42</b>
<b>Changing Your Password .....</b>	<b>44</b>

## Access the Account Maintenance Menu

You should login to the Electronic Records Express website using your personal User ID and password. The website address is: <http://eme.ssa.gov>. Upon a successful login, you will see the Electronic Records Express home page. In the left navigation panel, select the “Account Maintenance” hyperlink.



Next, you will see the Account Maintenance Menu screen which is shown below.



From the Account Maintenance Menu, you can select options which will allow you to create users, search accounts, and perform maintenance on your own account.

## Create an Individual End-User Account

From the Account Maintenance Menu, select the “Create an Individual End User Account” hyperlink.

Note that mandatory fields on this web page are marked with a red asterisk.

You may select the “Demo Account” checkbox at the top of the page. Doing so will set up a demo account. This is probably not an option you want to select for your providers as files submitted under a demo account login do not get received by DMA and routed into the electronic folder. Therefore, please be certain that you are not selecting this checkbox when you are setting up medical evidence providers to use the Electronic Records Express Services website to upload files to the DDS.

Enter a User ID in the text box shown below. SSA Policy requires that all User IDs be exactly 8 characters in length and they must contain at least 1 numeric and 1 alphabet character. Special characters (e.g., &, %, #, @, etc.) are not permitted. Once you have typed in the User ID, click the **Check User ID** button.

https://199.173.231.150 - Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer prov

File Edit View Favorites Tools Help

Social SecurityOnline  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

**Electronic Records Express**  
**Create an Individual End-User Account**

An asterisk (\*) indicates a mandatory field.

☐ Demo Account

User Id \*

First Name: \*   
Middle Name:   
Last Name: \*

Organization Type: \* [ Select Type ]  
Organization Name:   
Department:   
Position:

Primary Phone: \*  Ext:  [ Select Type ]  
Alternate Phone:  Ext:  [ Select Type ]  
Alternate Phone:  Ext:  [ Select Type ]  
Alternate Phone:  Ext:  [ Select Type ]

The screenshot below shows that the User ID “newuser2” does not exist. So, this may be used as a User ID for the account signup. If the User ID you entered had already existed, you would have to select a different User ID to signup the provider.


Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

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Social SecurityOnline  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

 **Electronic Records Express**  
**Create an Individual End-User Account**

• User ID newuser2 does not exist.

An asterisk (\*) indicates a mandatory field.

☐ Demo Account

User Id \* newuser2

First Name: \*

Middle Name:

Last Name: \*

Organization Type: \* [ Select Type ]

Organization Name:

Department:

Position:

Primary Phone: \*  Ext:  [ Select Type ]

Alternate Phone:  Ext:  [ Select Type ]

Alternate Phone:  Ext:  [ Select Type ]

Next you'll continue to enter information into the web page:

- First Name
- Last Name
- Select an organization type from the drop down menu
- Organization Name
- Department
- Position title of the new user

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

First Name: \*

Middle Name:

Last Name: \*

Organization Type: \* [Select Type]

Organization Name: [Select Type]

Department:

Position:

Primary Phone: \*

Alternate Phone:

Alternate Phone:

Alternate Phone:

Primary Email: \*

Alternate Email:

Address Line 1: \*

Address Line 2:

Address Line 3:

Address Line 4:

Country: \* United States

City: \*

State/Territory: \* ALABAMA

Zip Code: \*

Continue entering information into the web page:

- Primary telephone number
- Select type of phone number from the drop down menu (work, fax, cell, pager, other)
- You may enter up to 3 additional alternate telephone numbers
- Enter primary email address
- You may enter an alternate email address
- Enter the address for the user

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

Address Line 1: \*

Address Line 2:

Address Line 3:

Address Line 4:

Country: \* United States v

City: \*

State/Territory: \* ALABAMA v

Zip Code: \*

---

Primary Site: \* [Select Site] v

Primary Site Contact: \* [Select Contact] v

Select the functions that apply to the user: \*

☐ Consultative Exam (CE)

☐ Consultative Exam with Scanned Signature (CESS)

☐ Communications Utility (CU)

☐ Grouped Files (Grouped MER)

☐ Send Individual Case (MER)

You will see a line separator in the web page. This signals you to enter sponsor information.

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

Address Line 2:

Address Line 3:

Address Line 4:

Country: \* United States v

City: \*

State/Territory: \* ALABAMA v

Zip Code: \*

---

Primary Site: \* [Select Site] v

Primary Site Contact: \* [Select Contact] v

Select the functions that apply to the user: \*

☐ Consultative Exam (CE)

☐ Consultative Exam with Scanned Signature (CESS)

☐ Communications Utility (CU)

☐ Grouped Files (Grouped MER)

☐ Send Individual Case (MER)

☐ Send Report to Doctor for Review (CEReview)

☐ Send Request to Doctor (REQ)

---

Add Comments:

Create Cancel

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From the drop down list, select the primary DDS site the user will send evidence.

Select the sponsor from the drop down list.

Electronic Records Express - Create an Individual End-User Account

File Edit View Favorites Tools Help

Address Line 3:

Address Line 4:

Country: \*

City: \*

State/Territory: \*

Zip Code: \*

Primary Site: \*

Primary Site Contact: \*

Utilities that apply to the user: \*

☐ Send Report to Doctor for Review (CEReview)

☐ Send Request to Doctor (REQ)

Add Comments:

Create Cancel

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The next step is extremely important. You will be selecting the website utilities that permit the user access. Please be sure to select all utilities the user needs.

Note: The secure messaging option needs prior approval from the Electronic Records Express Project Manager.

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

Address Line 3:

Address Line 4:

Country: \* United States

City: \*

State/Territory: \* ALABAMA

Zip Code: \*

---

Primary Site: \* [ Select Site ]

Primary Site Contact: \* [ Select Contact ]

Select the functions that apply to the user: \*

☐ Consultative Exam (CE)

☐ Consultative Exam with Scanned Signature (CESS)

☐ Communications Utility (CU)

☐ Grouped Files (Grouped MER)

☐ Send Individual Case (MER)

☐ Send Report to Doctor for Review (CEReview)

☐ Send Request to Doctor (REQ)

---

Add Comments:

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You may type in any comments in the “Comments” text box.

Click the **Create** button to continue to create the account. Click the **Cancel** button to cancel this account setup.

You will now see a summary page for the account.

Electronic Records Express - Create an Individual End-User Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1

File Edit View Favorites Tools Help

Social SecurityOnline **Electronic Records Express** Home Questions? How to Contact Us Search


www.socialsecurity.gov

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

 **Electronic Records Express**  
**Create an Individual End-User Account**

User Id: **newuser2**

First Name: **New**  
Middle Name:  
Last Name: **User**

Organization **Hospital/Clinic Personnel**  
Type: **(Excluding Contract Copy Services)**

Organization Name:  
Department:  
Position:

Primary Phone: **410-555-5555** Ext: Type: **WORK**  
Alternate Phone: Ext: Type:  
Alternate Phone: Ext: Type:

Electronic Records Express - Create an Individual End-User Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1

File Edit View Favorites Tools Help

Address Line 2:  
Address Line 3:  
Address Line 4:  
City: **Anytown**  
State/Territory: **AL**  
Zip Code: **21235**  
Country: **United States**

Primary Site: **AL - BIRMINGHAM DDS [S01]**  
Primary Site **Bell, Linda**  
Contact:  
Function(s) **Consultative Exam (CE)**  
selected: **Communications Utility (CU)**  
**Grouped Files (Grouped MER)**  
**Send Individual Case (MER)**  
**Send Report to Doctor for Review (CEReview)**  
**Send Request to Doctor (REQ)**

Added Comments:

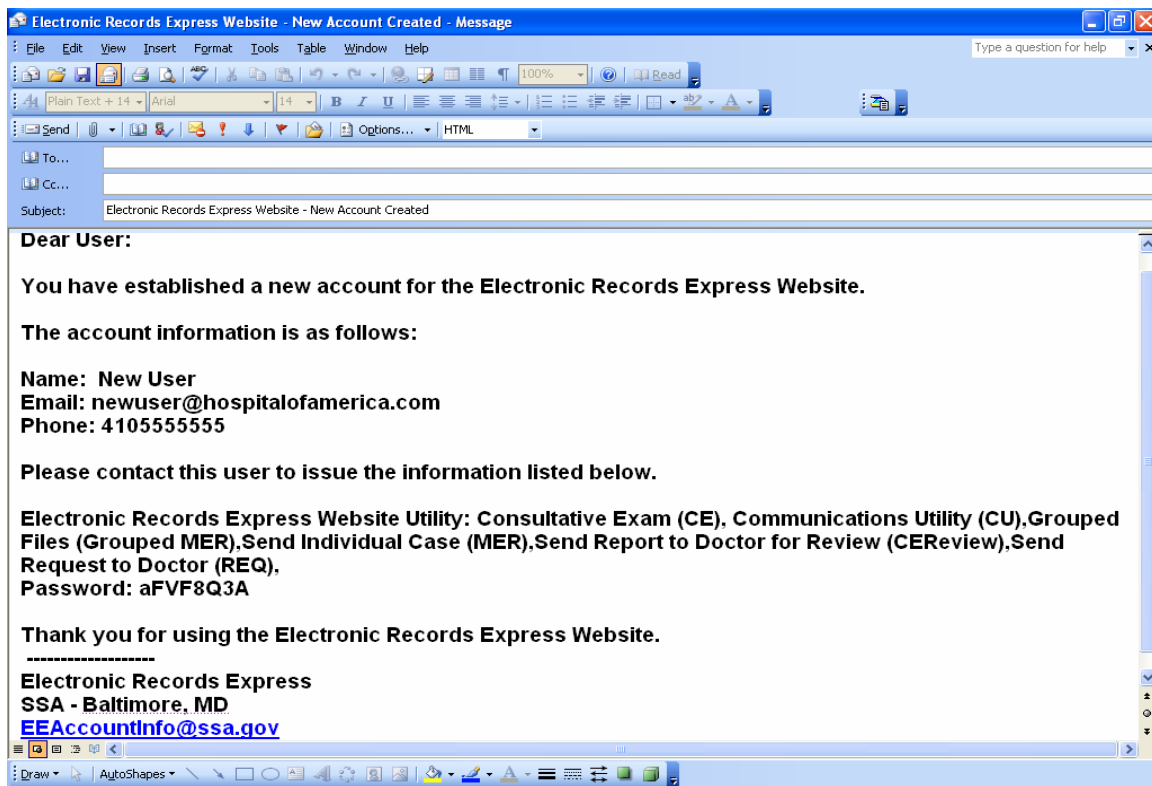
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Click the **Edit** button to return to the prior screen to change any information you have entered. Click the **Submit** button to create the account. Click the **Cancel** button to cancel the account setup.

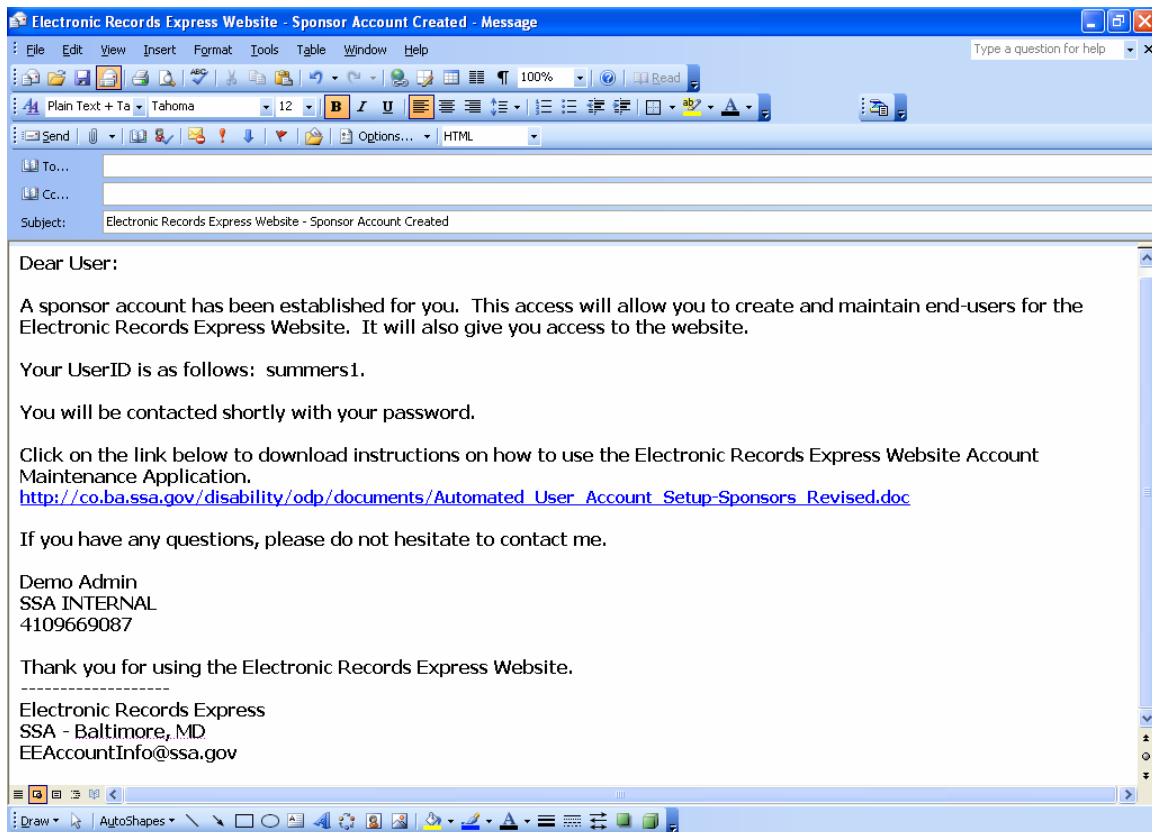
Clicking **Submit** will activate the new account. You will receive a confirmation screen similar to the one shown below:



You, the sponsor, will receive a confirmation email similar to the one shown below:



Your provider will receive an email message similar to the one shown below:



**What happens now?**

The User ID and instructions have been emailed to the primary email address you provided for the new user.

The sponsor must contact the new user to provide the password. The temporary password is listed on the website confirmation screen and it has also been sent to you via your SSA email address.

Please be sure to explain to your new user that the password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change their password.

Your new user now has access to the Electronic Records Express website.

## Create an Organizational Shared End-User Account

From the Account Maintenance Menu, select the “Create an Organizational Shared End User Account” hyperlink.

Note that mandatory fields on this webpage are marked with a red asterisk.

You may select the “Demo Account” checkbox at the top of the page. Doing so will set up a demo account. This is probably not an option you want to select for your providers as files submitted under a demo account login do not get received by DMA and routed into the electronic folder. Therefore, please be certain that you are not selecting this checkbox when you are setting up medical evidence providers to use the Electronic Records Express Services website to upload files to the DDS.

Enter a User ID in the text box shown below. SSA Policy requires that all User IDs be exactly 8 characters in length and they must contain at least 1 numeric and 1 alphabet character. Special characters (e.g., &, %, #, @, etc.) are not permitted. Once you have typed in the User ID, click the **Check User ID** button.

Electronic Records Express - Create an Organizational Shared End-User Account - Microsoft Internet Explorer provided by IE6.0 S

File Edit View Favorites Tools Help

Social SecurityOnline  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

**Electronic Records Express**  
**Create an Organizational Shared End-User Account**

An asterisk (\*) indicates a mandatory field.

☐ Demo Account

User Id \*

Organization Type: \* [Select Type]

Organization Name: \*

Department:

Primary Phone: \*  Ext:  [Select Type]

Alternate Phone:  Ext:  [Select Type]

Alternate Phone:  Ext:  [Select Type]

Alternate Phone:  Ext:  [Select Type]

Address Line 1: \*

Address Line 2:

Address Line 3:

Address Line 4:

Country: \* United States

The screenshot below shows that the User ID “neworg39” does not exist. So, this may be used as a User ID for the account signup. If the User ID you entered had already existed, you would have to select a different User ID to signup the organizational shared end user account.


https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Social SecurityOnline  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

 **Electronic Records Express**  
**Create an Organizational Shared End-User Account**

• User ID neworg39 does not exist.

An asterisk (\*) indicates a mandatory field.

☐ Demo Account

User Id \* neworg39

Organization Type: \* [Select Type] v

Organization Name: \*

Department:

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Address Line 1: \*

Address Line 2:

Address Line 3:

Next you'll continue to enter information into the web page:

- Select an organization type from the drop down menu
- Organization Name
- Department
- Primary telephone number
- Select type of phone number from the dropdown menu(work, fax, cell, pager, other)
- You may enter up to 3 additional alternate phone numbers for the organization
- Enter the organization's address

You will see a line separator and you should begin entering the sponsor's information.

From the drop down list, select the primary DDS site the user will send evidence.

Select the sponsor from the drop down list.



https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Primary Site: \* [Select Site] v

Primary Site Contact: \* [Select Contact] v

Select the functions that apply to the user: \*

- ☐ Consultative Exam (CE)
- ☐ Consultative Exam with Scanned Signature (CESS)
- ☐ Communications Utility (CU)
- ☐ Grouped Files (Grouped MER)
- ☐ Send Individual Case (MER)
- ☐ Send Report to Doctor for Review (CEReview)
- ☐ Send Request to Doctor (REQ)

**Primary Contact Information**

First Name: \*

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

The next step is extremely important. You will be selecting the website utilities that the users will have access to. Please be sure to select all utilities the users need.

Note: The secure messaging option needs prior approval from the Electronic Records Express Project Manager.

Note: the Consultative Exam (CE) utility cannot be selected for an Organizational Shared End User account.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

**The CE selection is not available. CE Providers must have an individual end user account and may not share their login with anyone.**

---

Primary Site: \* [Select Site] v

Primary Site Contact: \* [Select Contact] v

Select the functions that apply to the user: \*

☐ Consultative Exam (CE)

☐ Consultative Exam with Scanned Signature (CESS)

☐ Communications Utility (CU)

☐ Grouped Files (Grouped MER)

☐ Send Individual Case (MER)

☐ Send Report to Doctor for Review (CEReview)

☐ Send Request to Doctor (REQ)

---

**Primary Contact Information**

First Name: \*

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

You'll see another line separator in the page. You will now enter information for the organizational shared end user account's primary contact (name, phone, and email).

You'll notice another line separator and then you will enter information for the organizational shared end user account's backup contact.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

**Primary Contact Information**

First Name: \*

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

**Backup Contact Information**

First Name: \*

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

You may type in any comments in the “Comments” text box.

Click the **Create** button to continue to create the account. Click the **Cancel** button to cancel this account setup.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Primary Phone: \*  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Primary Email: \*

Alternate Email:

---

**Backup Contact Information**

First Name: \*

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Primary Email: \*

Alternate Email:

---

Add Comments

Create Cancel

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You will now see a summary page for the account.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Social SecurityOnline Electronic Records Express

www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

**Electronic Records Express**  
Create an Organizational Shared End-User Account

User Id: neworg39

Organization **Hospital/Clinic Personnel**  
Type: **(Excluding Contract Copy Services)**

Organization **John Hopkins Medical Center**  
Name:  
Department:

Primary **410-555-1212** Ext: Type: **WORK**  
Phone:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Address Line **111 South Main Street**  
1:  
Address Line  
2:

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Address Line **111 South Main Street**  
 1:  
 Address Line  
 2:  
 Address Line  
 3:  
 Address Line  
 4:  
 City: **Anytown**  
 State/Territory: **AL**  
 Zip Code: **21221**  
 Country: **United States**

---

Primary Site: **MD - BALTIMORE DDS [V40]**  
 Primary Site **Morgan, Roy**  
 Contact:

Function(s) **Consultative Exam with Scanned**  
 selected: **Signature (CESS)**  
**Communications Utility (CU)**  
**Grouped Files (Grouped MER)**  
**Send Individual Case (MER)**  
**Send Report to Doctor for Review (CEReview)**  
**Send Request to Doctor (REQ)**

---

**Primary Contact Information**  
 First Name: **New**

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

**Primary Contact Information**  
 First Name: **New**  
 Middle Name:  
 Last Name: **User**

Primary **410-555-1212** Ext: Type: **WORK**  
 Phone:  
 Alternate Ext: Type:  
 Phone:  
 Alternate Ext: Type:  
 Phone:  
 Alternate Ext: Type:  
 Phone:

Primary Email: **clarence.davis@ssa.gov**  
 Alternate Email:

---

**Backup Contact Information**  
 First Name: **New Jr**  
 Middle Name:  
 Last Name: **User**

Primary **410-552-1212** Ext: Type: **WORK**  
 Phone:  
 Alternate Ext: Type:  
 Phone:  
 Alternate Ext: Type:

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Primary Email: **clarence.davis@ssa.gov**  
Alternate  
Email:

---

**Backup Contact Information**  
First Name: **New Jr**  
Middle Name:  
Last Name: **User**

Primary **410-552-1212** Ext: Type: **WORK**  
Phone:  
Alternate Ext: Type:  
Phone:  
Alternate Ext: Type:  
Phone:  
Alternate Ext: Type:  
Phone:

Primary Email: **clarence.davis@ssa.gov**  
Alternate  
Email:

---

Added  
Comments:

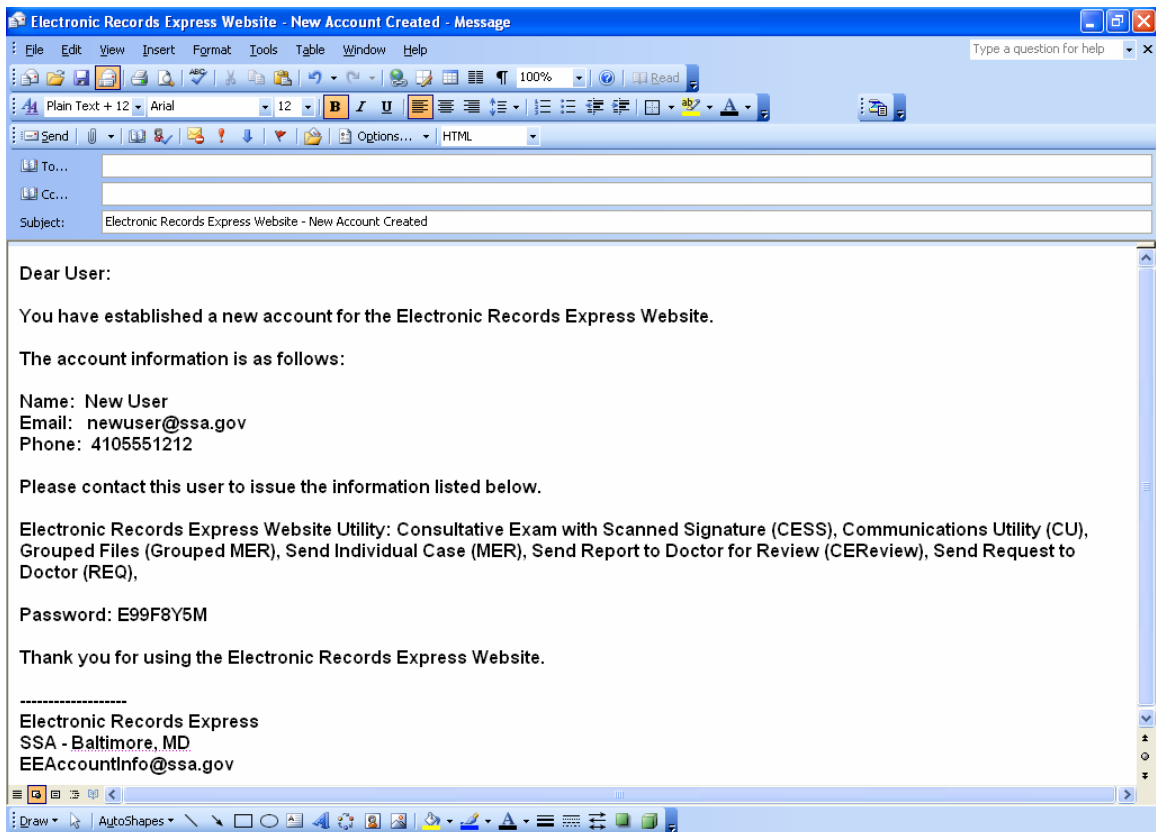
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Click the **Edit** button to return to the prior screen to change any information you have entered. Click the **Submit** button to create the account. Click the **Cancel** button to cancel the account setup.

Clicking **Submit** will activate the new account. You will receive a confirmation screen similar to the one shown below:



You will receive a confirmation email similar to the one shown below:



**What happens now?**

The User ID and instructions have been emailed to the primary contact's email address that you provided.

The sponsor must contact the new user to provide the password. The temporary password is listed on the website confirmation screen and it has also been sent to you via your SSA email address.

Please be sure to explain to your new user that the password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change their password.

Your new user now has access to the Electronic Records Express website.



## Search Accounts on Specified Criteria

From the Account Maintenance Menu, select the “Search on Specified Criteria” link.

You may enter many different types of information to find accounts. Search criteria include:

- User ID
- First name
- Last name
- Phone
- Email
- Primary DDS Site

You may select one of the radio buttons to:

- Match **all** information entered
- Match **any** information entered
- Match information **exactly**

The screenshot shows a web browser window titled "Electronic Records Express - Search on Specified Criteria - Microsoft Internet Explorer provided by IE6.0 SP1 > Alpha C1". The browser's address bar shows "www.socialsecurity.gov". The page has a red header with "Social SecurityOnline" and "Electronic Records Express". Below the header is a navigation bar with links: "Home", "Questions?", "How to Contact Us", and "Search". On the left side, there is a sidebar with links: "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout". The main content area is titled "Electronic Records Express Search on Specified Criteria". It contains several input fields: "User Id:", "First Name:", "Last Name:", "Phone:", "Email:", and "Primary Site:" (a dropdown menu with "[ Select Site ]"). Below these fields are three radio buttons: "Match All Information Entered" (selected), "Match Any Information Entered", and "Match Information Exactly". Below the radio buttons is a section titled "Select functions to include in the search" with a list of checkboxes: "Consultative Exam (CE)", "Consultative Exam with Scanned Signature (CESS)", "Communications Utility (CU)", "Grouped Files (Grouped MER)", "Send Individual Case (MER)", "Send Report to Doctor for Review (CEReview)", "Send Request to Doctor (REQ)", and "Secure Messaging (SM)".

Next, you may check the boxes for the utility access the user(s) have. You may click a radio button to match either **all** or **any** of the selected functions.

You may also select the checkbox to include demo accounts in your search.

Electronic Records Express - Search on Specified Criteria - Microsoft Internet Explorer provided by IE6.0 SP1 > Alpha CI

File Edit View Favorites Tools Help

Logout

Last Name:

Phone:

Email:

Primary Site: [ Select Site ]

☒ Match All Information Entered  
☐ Match Any Information Entered  
☐ Match Information Exactly

Select functions to include in the search

☐ Consultative Exam (CE)  
☐ Consultative Exam with Scanned Signature (CESS)  
☐ Communications Utility (CU)  
☐ Grouped Files (Grouped MER)  
☐ Send Individual Case (MER)  
☐ Send Report to Doctor for Review (CEReview)  
☐ Send Request to Doctor (REQ)  
☐ Secure Messaging (SM)

☒ Match All Selected Functions  
☐ Match Any Selected Functions

☐ Include Demo Accounts  
☐ Exclude Deleted Accounts

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A search for users with Primary Site affiliation S34 yielded the results shown below. Please note that you may have to use the scroll bar at the bottom of your web browser to see the complete database.

https://199.173.231.150 - Electronic Records Express - Search on Specified Criteria - Microsoft Internet Explorer provided by I

File Edit View Favorites Tools Help

Social Security Online **Electronic Records Express**


www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

 **Electronic Records Express**  
**Search Results**

Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.

User Id	Account Type	First Name	Last Name	Organization	Phone	Email	Site
abrooks1	EndUser	J.	Brooks		505--345-6100	david.hsieh@ssa.gov	S34
aghaffa1	EndUser	Ali	Ghaffari		505-762-6492	david.hsieh@ssa.gov	S34
ajakins1	EndUser	Alan	Jankins		505-687-6849	david.hsieh@ssa.gov	S34
apreeve1	EndUser	Anthony	Reeve	Industrial Rehabilitation Clinics	505-797-7691	david.hsieh@ssa.gov	S34
cadams12	EndUser	Carl	Adams		505-883-8984	david.hsieh@ssa.gov	S34
clmorga1	EndUser	Clifford	Morgan	Psychology & Counseling Services, Inc	505-8657100	david.hsieh@ssa.gov	S34
collins1	EndUser	Charles	Collins		505-532-0880	david.hsieh@ssa.gov	S34
clclift1	EndUser	C.R.	Clifton		352-336-	david.hsieh@ssa.gov	S34

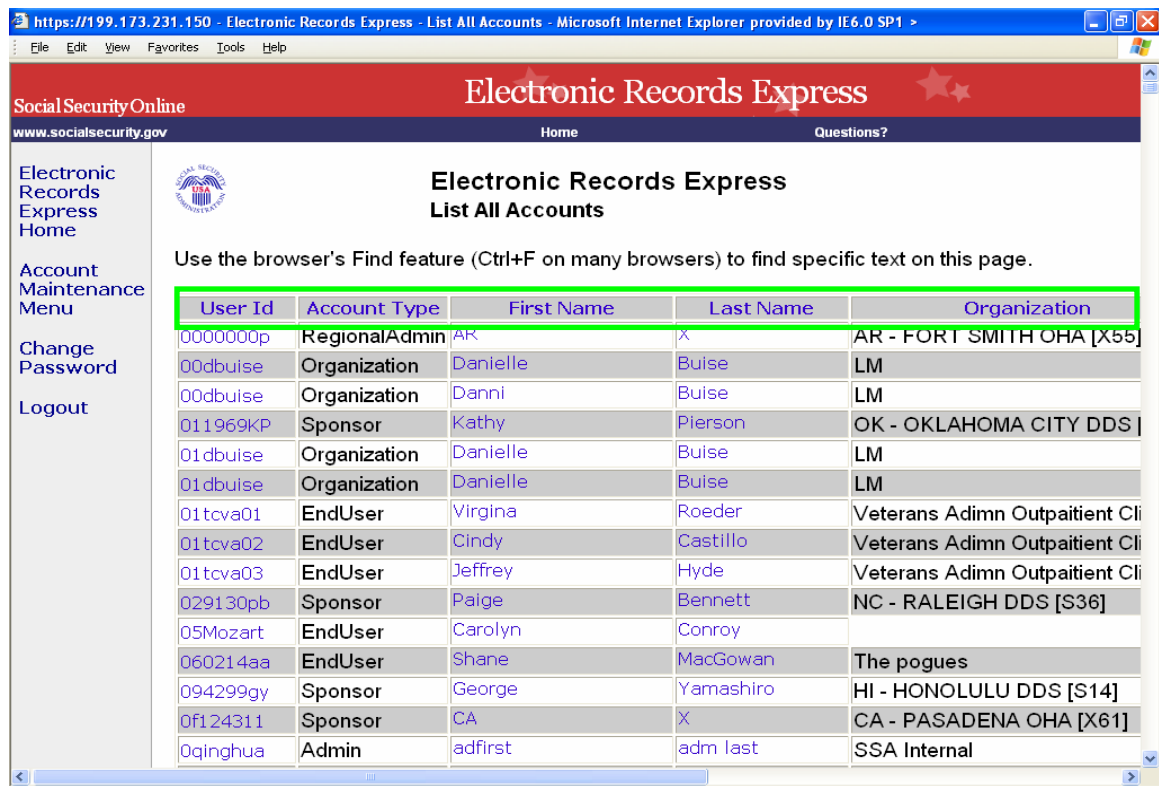
## List All Accounts Alphabetically by User ID

From the Account Maintenance Menu, select the link “List all accounts alphabetically by User ID”. The next page shown below illustrates the result of this search. The database of users is organized with the following information categories:

It may be necessary for you to use the scroll bar at the bottom of your web browser window to see the entire database.

You can select a category to sort the database. To do this, simply click a column heading across the top of the database.

Sorting the database may be useful if you are looking for a user’s last name, user ID, or Site (if you wish to list all users your site has signed up).



The screenshot shows a web browser window with the address bar displaying "https://199.173.231.150 - Electronic Records Express - List All Accounts - Microsoft Internet Explorer provided by IE6.0 SP1". The page title is "Electronic Records Express" and the subtitle is "List All Accounts". The page content includes a table of accounts with columns: User Id, Account Type, First Name, Last Name, and Organization. The table is sorted alphabetically by User ID. The first row is highlighted in green.

User Id	Account Type	First Name	Last Name	Organization
0000000p	RegionalAdmin	AK	X	AR - FORT SMITH OHA [X55]
00dbuise	Organization	Danielle	Buise	LM
00dbuise	Organization	Danni	Buise	LM
011969KP	Sponsor	Kathy	Pierson	OK - OKLAHOMA CITY DDS [
01dbuise	Organization	Danielle	Buise	LM
01dbuise	Organization	Danielle	Buise	LM
01tcva01	EndUser	Virgina	Roeder	Veterans Adimn Outpatient Cl
01tcva02	EndUser	Cindy	Castillo	Veterans Adimn Outpatient Cl
01tcva03	EndUser	Jeffrey	Hyde	Veterans Adimn Outpatient Cl
029130pb	Sponsor	Paige	Bennett	NC - RALEIGH DDS [S36]
05Mozart	EndUser	Carolyn	Conroy	
060214aa	EndUser	Shane	MacGowan	The pogues
094299gy	Sponsor	George	Yamashiro	HI - HONOLULU DDS [S14]
0f124311	Sponsor	CA	X	CA - PASADENA OHA [X61]
0qinghua	Admin	adfirst	adm last	SSA Internal

https://199.173.231.150 - Electronic Records Express - List All Accounts - Microsoft Internet Explorer provided by IE6.0 SP1 >

File Edit View Favorites Tools Help

Electronic Records Express

Questions? How to Contact Us Search

Electronic Records Express

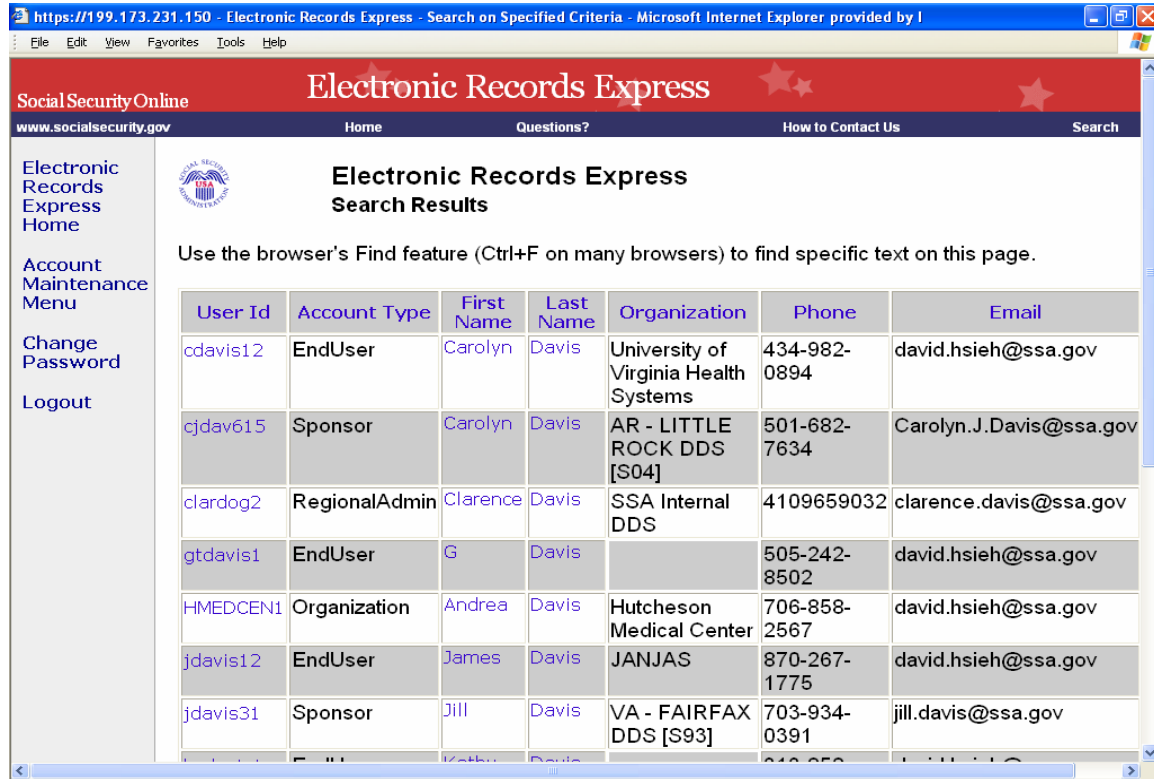
Click on the links below to find specific text on this page.

Last Name	Organization	Phone	Email	Site
	AR - FORT SMITH OHA [X55]	456	qinghua.liu@ssa.gov	
ise	LM	4105942565	danielle.c.buise@ssa.gov	S01
ise	LM	4102525252	danielle.c.buise@ssa.gov	S01
erson	OK - OKLAHOMA CITY DDS [S39]	4054192576	kathleen.pierson@ssa.gov	
ise	LM	4105942565	danielle.c.buise@ssa.gov	S01
ise	LM	4105945858	danielle.c.buise@ssa.gov	S01
eder	Veterans Adimn Outpatient Clinic	231-932-9720	david.hsieh@ssa.gov	S94
stillo	Veterans Adimn Outpatient Clinic	231-932-9720	david.hsieh@ssa.gov	S94
de	Veterans Adimn Outpatient Clinic	231-932-9720	david.hsieh@ssa.gov	S94
nnett	NC - RALEIGH DDS [S36]	800-443-9360	Paige.Bennett@ssa.gov	
nroy		828-698-1779	david.hsieh@ssa.gov	S36
cGowan	The pogues	1	jeffrey.caplan@ssa.gov	V40
mashiro	HI - HONOLULU DDS [S14]	808-973-2244	George.Yamashiro@ssa.gov	
	CA - PASADENA OHA [X61]	123	qinghua.liu@ssa.gov	
m last	SSA Internal	44123	qinghua.liu@ssa.gov	

## Modify an Account

To modify information in an existing account (individual end user or organizational shared end user), click on “Search on Specified Criteria” from the Account Maintenance Menu. Enter the information you know and search for the account.

A search performed with the last name “Davis” was entered and the following accounts were listed.



User Id	Account Type	First Name	Last Name	Organization	Phone	Email
<a href="#">cdavis12</a>	EndUser	<a href="#">Carolyn</a>	<a href="#">Davis</a>	University of Virginia Health Systems	434-982-0894	<a href="#">david.hsieh@ssa.gov</a>
<a href="#">cjdav615</a>	Sponsor	<a href="#">Carolyn</a>	<a href="#">Davis</a>	AR - LITTLE ROCK DDS [S04]	501-682-7634	<a href="#">Carolyn.J.Davis@ssa.gov</a>
<a href="#">clardog2</a>	RegionalAdmin	<a href="#">Clarence</a>	<a href="#">Davis</a>	SSA Internal DDS	4109659032	<a href="#">clarence.davis@ssa.gov</a>
<a href="#">gtdavis1</a>	EndUser	<a href="#">G</a>	<a href="#">Davis</a>		505-242-8502	<a href="#">david.hsieh@ssa.gov</a>
<a href="#">HMEDCEN1</a>	Organization	<a href="#">Andrea</a>	<a href="#">Davis</a>	Hutcheson Medical Center	706-858-2567	<a href="#">david.hsieh@ssa.gov</a>
<a href="#">jdavis12</a>	EndUser	<a href="#">James</a>	<a href="#">Davis</a>	JANJAS	870-267-1775	<a href="#">david.hsieh@ssa.gov</a>
<a href="#">jdavis31</a>	Sponsor	<a href="#">Jill</a>	<a href="#">Davis</a>	VA - FAIRFAX DDS [S93]	703-934-0391	<a href="#">jill.davis@ssa.gov</a>

Click on the hyperlinked information (User ID, First Name, or Last Name) fields for the desired account. This will take you to the Account Summary page for the account.



Scroll down to the bottom of the Account Summary page and click the **Modify** button. This brings up the Modify Account page which is laid out in the same format that was used to establish the account. You may find the information you want to modify and make changes.

Be sure to click the **Modify** button at the bottom of this page. You will then see a summary page for the account. After verifying the account information is accurate on the next screen, click the **Submit** button at the bottom of the page to activate your changes.

## Suspend an Account

To suspend an existing account (individual end user or organizational shared end user), click on “Search on Specified Criteria” from the Account Maintenance Menu. Enter the information you know and search for the account.

A search for “newhosp9” in the User ID field yielded the following results:



The screenshot shows a web browser window with the address bar displaying "https://199.173.231.150 - Electronic Records Express - Search on Specified Criteria - Microsoft Internet Explorer provided by I". The page title is "Electronic Records Express". The main content area is titled "Electronic Records Express Search Results" and includes a message: "Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page." Below this message is a table with the following data:

User Id	Account Type	First Name	Last Name	Organization	Phone	Email	Site
<a href="#">newhosp9</a>	Organization	<a href="#">Edie</a>	<a href="#">Zen</a>	New Town Hospital	212-858-6621	david.hsieh@ssa.gov	V26

The page also features a sidebar with links: "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout". The footer includes the "FIRSTGOV" logo, a list of policies (Privacy Policy, Accessibility Policy, Linking Policy, Site Map, Help), and the "Benefits.gov" logo.

Clicking on the hyperlinked information (User ID, First Name, or Last Name) fields for this account takes you to the Account Summary page for the account.



https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1 - AI

File Edit View Favorites Tools Help

Social SecurityOnline **Electronic Records Express**

www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

**Electronic Records Express Account Summary**

User Id: newhosp9

Role: **Organizational Shared End-User**

Status: **Active**

Organization **Hospital/Clinic Personnel**  
Type: **(Excluding Contract Copy Services)**

Organization **New Town Hospital**  
Name:  
Department: **Med Records**

Primary **8186665252** Ext: **2415** Type: **CELL**  
Phone:

Alternate Ext: Type:  
Phone:

Alternate Ext: Type:  
Phone:

Alternate Ext: Type:  
Phone:

Address Line **4343 Nightingale Drive**

To suspend the account, scroll to the bottom of the Account Summary page and click the **Suspend** button.

https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1 - AI

File Edit View Favorites Tools Help

Phone:

Primary Email: **david.hsieh@ssa.gov**  
Alternate Email:

**Backup Contact Information**  
First Name: **Barb**  
Middle Name:  
Last Name: **Levell**

Primary **2128689965** Ext: Type: **WORK**  
Phone:

Alternate Ext: Type:  
Phone:

Alternate Ext: Type:  
Phone:

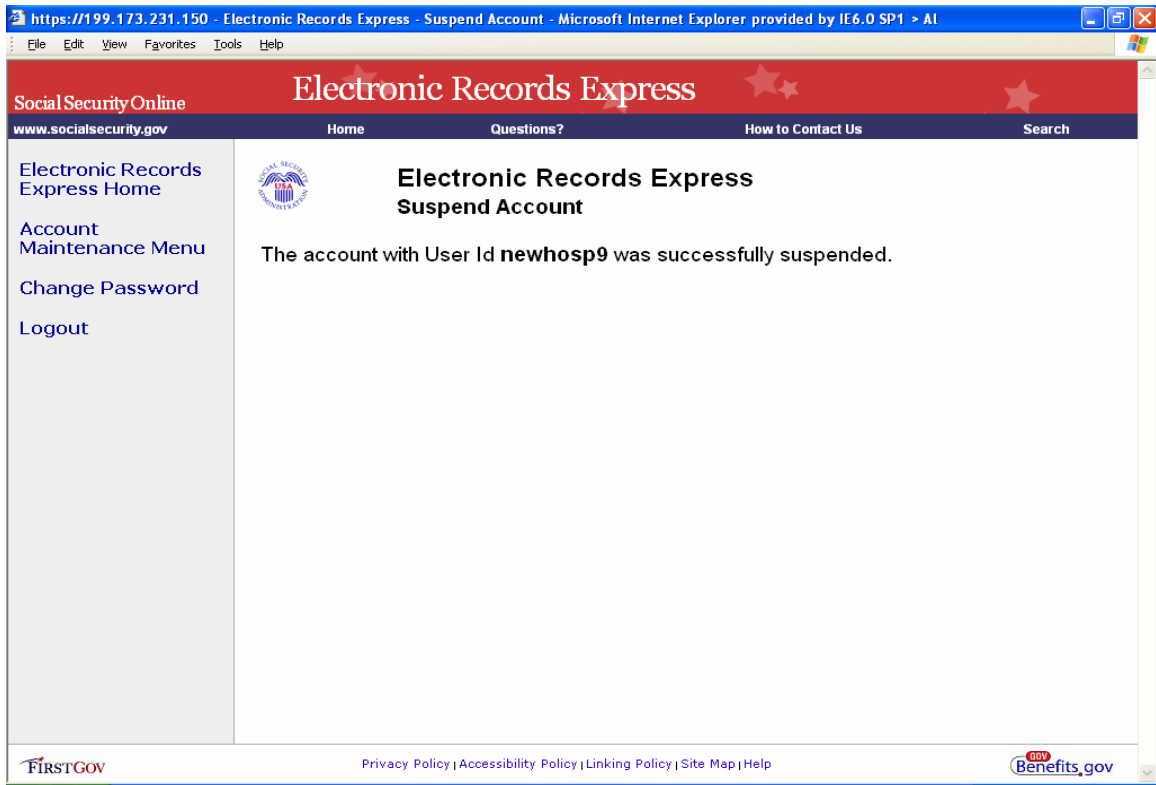
Alternate Ext: Type:  
Phone:

Primary Email: **david.hsieh@ssa.gov**  
Alternate Email:

[View Log History](#)

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You will then receive confirmation that the account has been suspended.



## Reactivating a Suspended Account

Access to the account can be restored at a later time if/when appropriate. To reactivate a suspended account, simply search for the account following the prior directions. The screen shot below of the Account Summary page shows that the account for “newhosp9” is suspended:

The screenshot shows a web browser window with the address bar displaying "https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1 - AI". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page header features the "Social Security Online" logo and the URL "www.socialsecurity.gov". Navigation links include Home, Questions?, How to Contact Us, and Search. A left sidebar contains links for "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout". The main content area is titled "Electronic Records Express Account Summary" and includes the Social Security Administration seal. The user information is as follows:

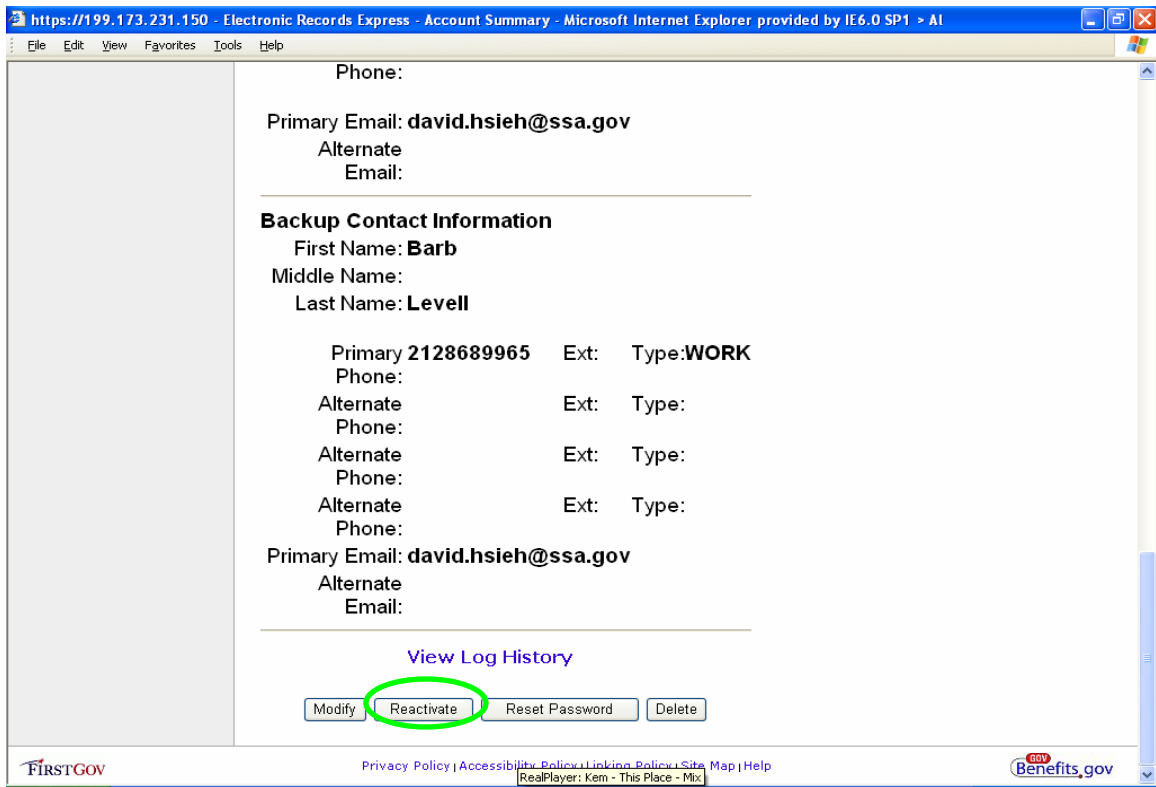
- User Id: newhosp9
- Role: Organizational Shared End-User
- Status: **Suspended** (highlighted with a green box)
- Organization: Hospital/Clinic Personnel
- Type: (Excluding Contract Copy Services)
- Organization: New Town Hospital
- Name:
- Department: Med Records

Phone information is listed in a table:

Primary	8186665252	Ext: 2415	Type: CELL
Phone:			
Alternate		Ext:	Type:
Phone:			
Alternate		Ext:	Type:
Phone:			
Alternate		Ext:	Type:
Phone:			

At the bottom of the page, the address line "Address Line 1: 1212 Midnight Drive" is partially visible.

Scroll down to the bottom of the page and select the Reactivate button at the bottom of the Account Summary page.



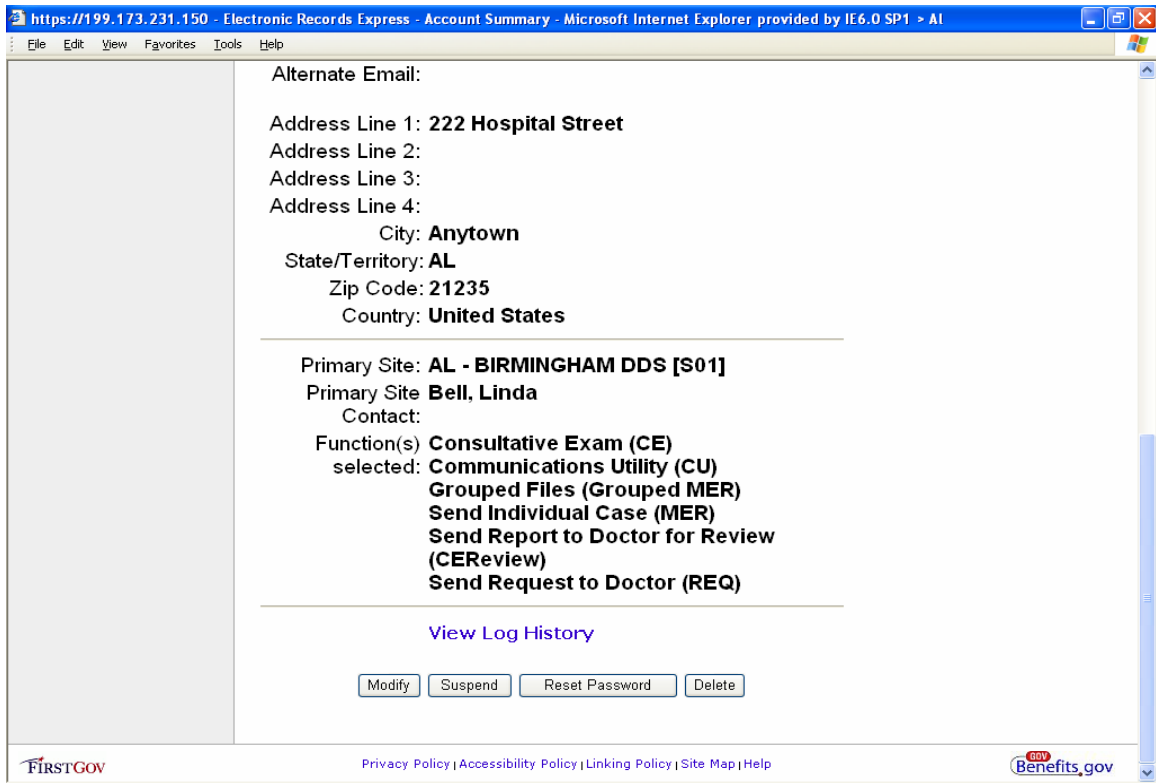
You will receive a confirmation page similar to the one shown below. The account may now be accessed once again by the user(s).



## Resetting a Password

To reset an account's password, click on "Search on Specified Criteria" from the Account Maintenance Menu. Enter the information you know, search for the account, and then select the account that you wish to reset the password on.

This brings you to the Account Summary page. Scroll to the bottom of the page and select the **Reset Password** button.



The screenshot shows a web browser window with the address bar displaying "https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE 6.0 SP1 > AI". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The main content area is divided into two sections. The left section is a grey sidebar. The right section contains the following information:

- Alternate Email:
- Address Line 1: **222 Hospital Street**
- Address Line 2:
- Address Line 3:
- Address Line 4:
- City: **Anytown**
- State/Territory: **AL**
- Zip Code: **21235**
- Country: **United States**

---

Primary Site: **AL - BIRMINGHAM DDS [S01]**  
Primary Site **Bell, Linda**  
Contact:

Function(s) **Consultative Exam (CE)**  
selected: **Communications Utility (CU)**  
**Grouped Files (Grouped MER)**  
**Send Individual Case (MER)**  
**Send Report to Doctor for Review (CEReview)**  
**Send Request to Doctor (REQ)**

---

[View Log History](#)

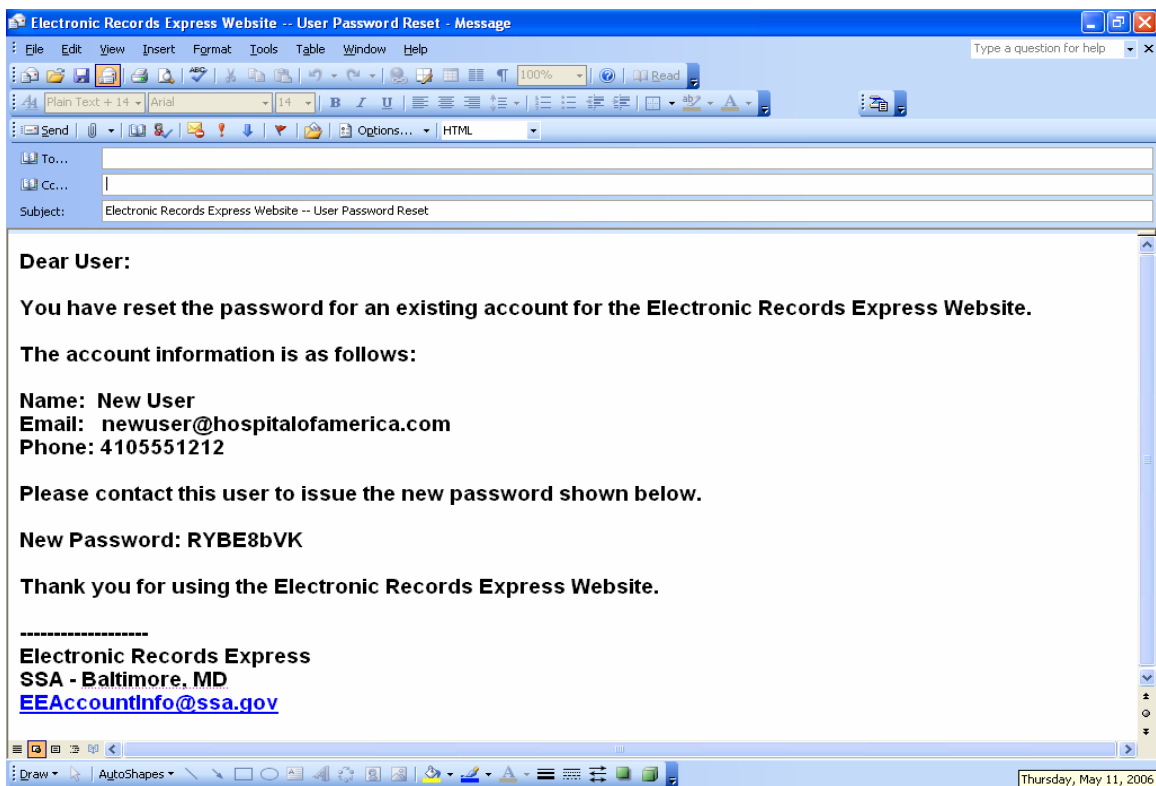
At the bottom of the right section are four buttons: **Modify**, **Suspend**, **Reset Password**, and **Delete**.

The footer of the page includes the **FIRSTGov** logo on the left, a link to [Privacy Policy](#) | [Accessibility Policy](#) | [Linking Policy](#) | [Site Map](#) | [Help](#) in the center, and the **Benefits.gov** logo on the right.

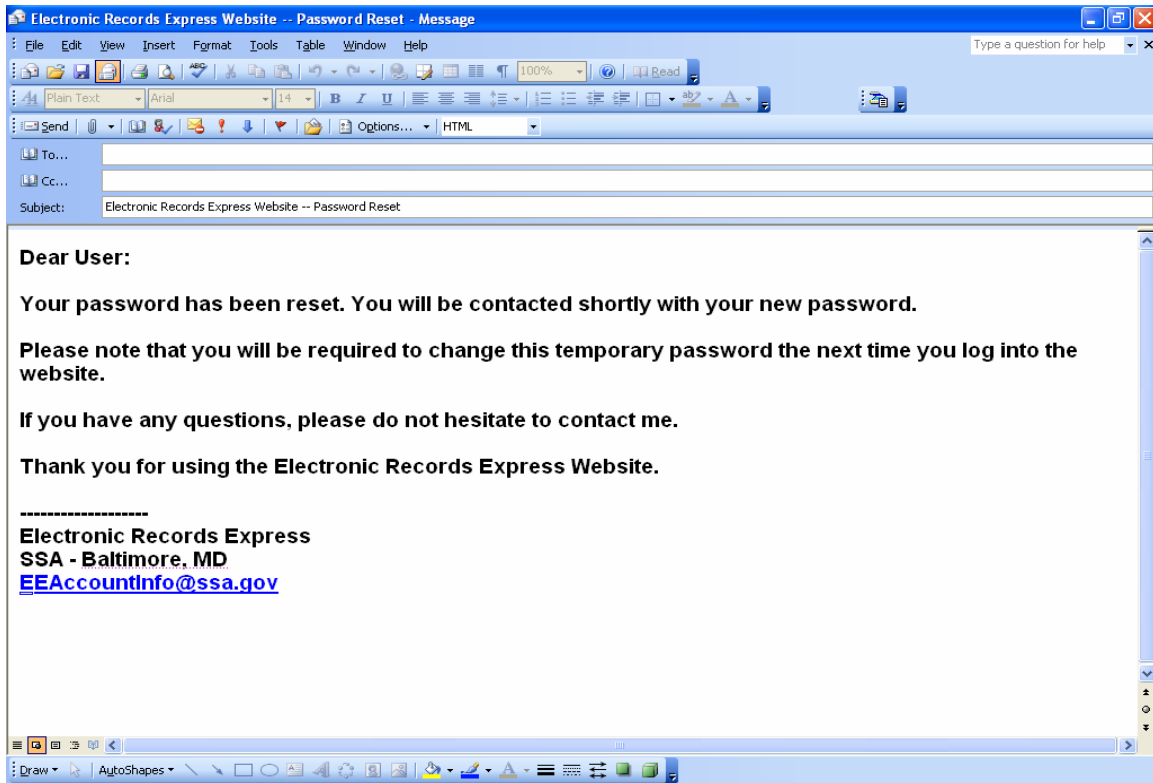
You will receive the new password after the web page refreshes.



You, the sponsor, receive the following email which also contains the new temporary (one time use) password:



The user receives the following email to confirm that the sponsor has reset the password and will contact the user shortly to provide the new password:



## Deleting an Account

**Please note that you should not be deleting accounts at this time.  
Deleting accounts permanently deletes all information including audit trails  
The example shown below is provided as a courtesy only.**

Search accounts by desired criteria. This example shows the “newuser2” account being deleted.

Click the **Delete** button at the bottom of the page.

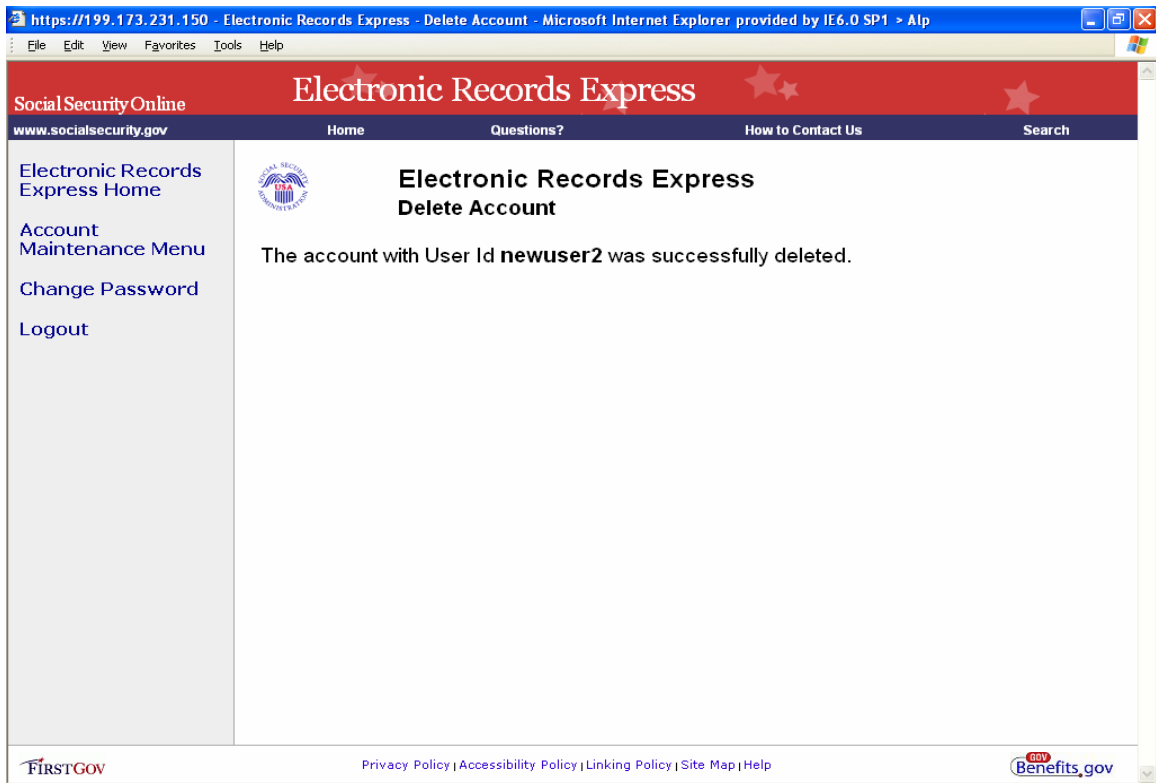
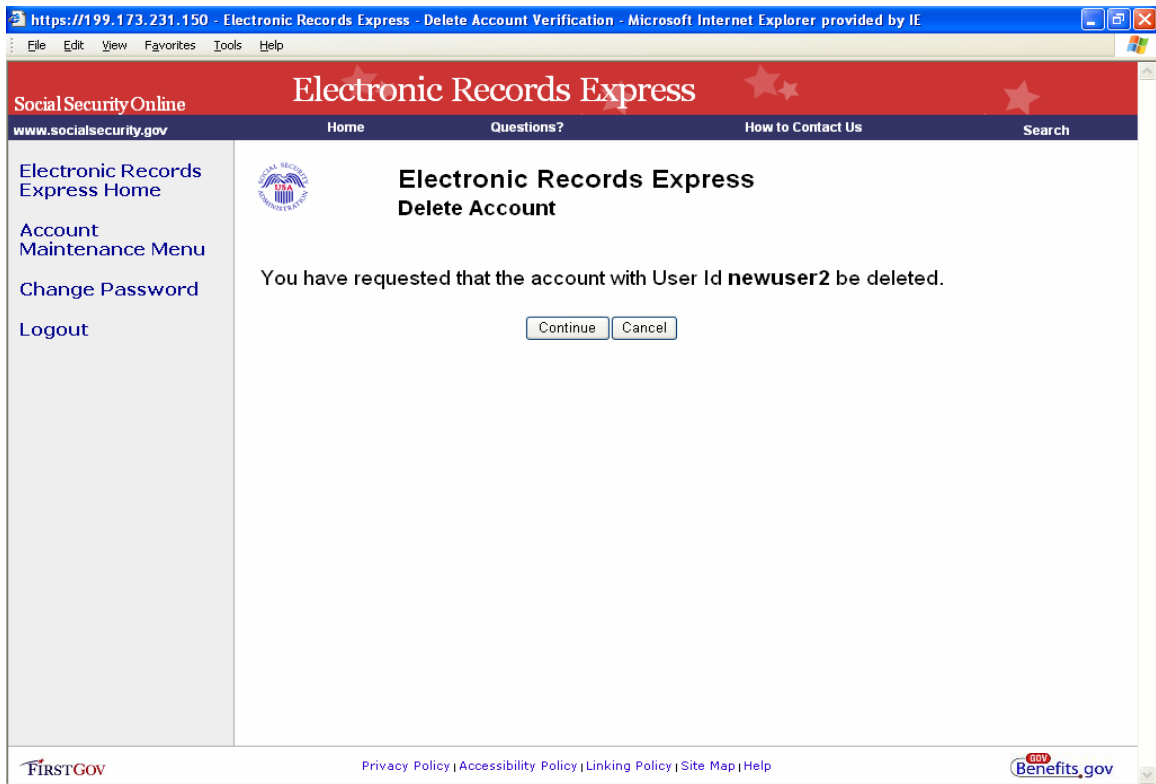
The screenshot shows a web browser window with the address bar displaying 'https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE 6.0 SP1 > AI'. The page content is organized into sections:

- Alternate Email:**
- Address Line 1:** 222 Hospital Street
- Address Line 2:**
- Address Line 3:**
- Address Line 4:**
- City:** Anytown
- State/Territory:** AL
- Zip Code:** 21235
- Country:** United States
- Primary Site:** AL - BIRMINGHAM DDS [S01]
- Primary Site:** Bell, Linda
- Contact:**
- Function(s):** Consultative Exam (CE)
- selected:** Communications Utility (CU), Grouped Files (Grouped MER), Send Individual Case (MER), Send Report to Doctor for Review (CEReview), Send Request to Doctor (REQ)
- View Log History** (link)
- Buttons:** Modify, Suspend, Reset Password, Delete

The footer of the page includes the FIRSTGOV logo, a link to Privacy Policy, Accessibility Policy, Linking Policy, Site Map, and Help, and the Benefits.gov logo.

The next page asks you to confirm your request to delete the specified account. Click the **Continue** button to delete the account. Next you'll receive a confirmation that the account was deleted.





## Modifying Your Account

From the Account Maintenance Menu, click on “Modify My Account Information”. The screen shots below show the information you can modify on your account. Be sure to click the **Modify** button to activate your changes.

The screenshot shows a web browser window with the address bar displaying "https://199.173.231.150 - Electronic Records Express - Modify My Account - Microsoft Internet Explorer provided by IE6.0 SP1". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page header features the "Social SecurityOnline" logo and the "Electronic Records Express" title, with navigation links for Home, Questions?, How to Contact Us, and Search. A left sidebar contains links for "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout". The main content area is titled "Electronic Records Express Modify My Account" and includes a Social Security Administration seal. A note states: "An asterisk (\*) indicates a mandatory field." The user's current information is displayed: "User Id: summers1", "Role: Sponsor", and "Status: Active". Below this are input fields for "First Name" (containing "New"), "Middle Name", and "Last Name" (containing "User"). The "Associated Sites" section features a dropdown menu with options: "[ Select Sites ]", "AK - ANCHORAGE DDS [S02]", "AL - BIRMINGHAM DDS [S01]", and "AL - BIRMINGHAM OHA [X77]". There are also fields for "Department" and "Position". The "Primary Phone" section includes a text field with "4105555555", an "Ext:" field, and a dropdown menu set to "WORK". Below this are two "Alternate Phone" entries, each with a text field, an "Ext:" field, and a "[ Select Type ]" dropdown menu.

https://199.173.231.150 - Electronic Records Express - Modify My Account - Microsoft Internet Explorer provided by IE6.0 SP1

File Edit View Favorites Tools Help

Social SecurityOnline  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

**Electronic Records Express**  
**Modify My Account**

An asterisk (\*) indicates a mandatory field.

User Id: **summers1**

Role: **Sponsor**  
Status: **Active**

First Name: \*   
Middle Name:   
Last Name: \*

Associated Sites:   
AK - ANCHORAGE DDS [S02]  
AL - BIRMINGHAM DDS [S01]  
AL - BIRMINGHAM OHA [X77]

Department:   
Position:

Primary Phone: \*  Ext:    
Alternate Phone:  Ext:    
Alternate Phone:  Ext:

https://199.173.231.150 - Electronic Records Express - Modify My Account - Microsoft Internet Explorer provided by IE6.0 SP1 >

File Edit View Favorites Tools Help

**Role: Sponsor**  
**Status: Active**

First Name: \* New  
Middle Name:   
Last Name: \* User

Associated Sites: \* [ Select Sites ]  
AK - ANCHORAGE DDS [S02]  
AL - BIRMINGHAM DDS [S01]  
AL - BIRMINGHAM OHA [X77]

Department:   
Position:

Primary Phone: \* 4105555555 Ext: WORK  
Alternate Phone: Ext: [ Select Type ]  
Alternate Phone: Ext: [ Select Type ]  
Alternate Phone: Ext: [ Select Type ]

Primary Email: \* clarence.davis@ssa.gov  
Alternate Email:

[View Log History](#)

Modify Cancel

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## Changing Your Password

From the Account Maintenance Menu, click the “Change Password” hyperlink.

Enter the old password.

Enter the new password.

Enter the new password again to verify it was entered correctly.

Click the **Submit** button to submit your password change.

The screenshot shows a web browser window with the address bar displaying "https://199.173.231.150 - Electronic Records Express - Change Password - Microsoft Internet Explorer provided by IE6.0 SP1 > AI". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The website header is red with "Social Security Online" and "www.socialsecurity.gov" on the left, and "Electronic Records Express" in the center. A navigation bar below the header contains links for Home, Questions?, How to Contact Us, and Search. On the left side of the page, there is a vertical menu with links: Electronic Records Express Home, Account Maintenance Menu, Change Password, and Logout. The main content area is titled "Electronic Records Express Change Password" and includes a note: "An asterisk (\*) indicates a mandatory field." Below this are three input fields labeled "Old Password: \*", "New Password: \*", and "Confirm New Password: \*". There are "Submit" and "Cancel" buttons below the fields. A section titled "To maintain a secure system, the account password needs to consist of the following requirements:" lists three bullet points: "SSA accounts must have a minimum password length of 7 characters.", "Passwords have to consist of both alpha and numeric/alpha-numeric characters. (Letters and numbers or special characters).", and "Passwords are case sensitive." The footer of the page includes the "FIRSTGOV" logo, a link to "Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help", and the "Benefits.gov" logo.

https://199.173.231.150 - Electronic Records Express - Change Password - Microsoft Internet Explorer provided by IE6.0 SP1 > AI

File Edit View Favorites Tools Help

Social Security Online  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

**Electronic Records Express**  
**Change Password**

An asterisk (\*) indicates a mandatory field.

Old Password: \*

New Password: \*

Confirm New Password: \*

**To maintain a secure system, the account password needs to consist of the following requirements:**

- SSA accounts must have a minimum password length of 7 characters.
- Passwords have to consist of both alpha and numeric/alpha-numeric characters. (Letters and numbers or special characters).
- Passwords are case sensitive.

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